

Programmatic TV Comes to Local Television in 2016

Current Status & What to Expect

February 17, 2016



Rick Ducey
Managing Director
BIA/Kelsey

Featuring an expert industry panel

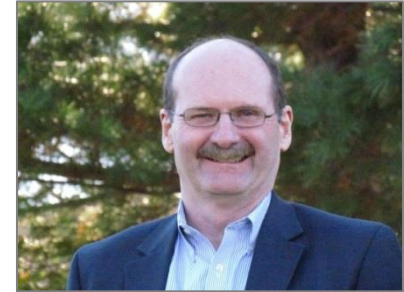
Mitch Oscar
Director Programmatic, USIM
Executive Industry Advisor,
BIA/Kelsey

Welcome

Webinar Overview

- Programmatic advertising has been garnering press attention and momentum in the past year.
- The industry seems prepared for a breakout year in local television.
- **In this webinar – the first in BIA/Kelsey’s programmatic series for 2016 - we will:**
 - Share our recent examination of the comparisons and contrasts of the national and local television markets
 - Explain what we can all expect as local programmatic ramps up over the year.
- This research has been organized by BIA/Kelsey and performed in partnership with our expert panel on today’s webinar.

Moderators



Rick Ducey

Managing Director
BIA/Kelsey

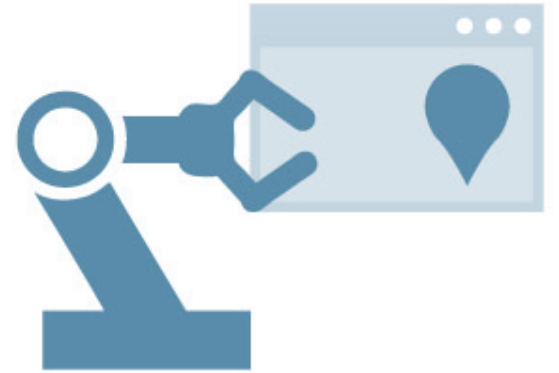


Mitch Oscar

Dir., Programmatic, USIM
Exec. Industry Advisor
BIA/Kelsey

Key Questions We'll Discuss During the Webinar

1. How do you view programmatic TV in terms of **compatibility with your existing traditional planning and buying endeavors?**
2. What are your key **partnerships or initiatives** in the programmatic TV realm?
3. How do you view **programmatic TV sales** in terms of its **compatibility to your existing traditional selling approach?**
4. How soon do you think **programmatic TV buying** will have an impact on **local TV inventory purchasing?**
5. What is your opinion on **programmatic TV's acceptance** by advertising agencies?
6. What are the **opportunities** you see in the programmatic TV realm for **data companies?**



Programmatic TV Comes to Local Television in 2016

Today's Expert Industry Panel Will Help Us Navigate the Issues & Opportunities



Brett Adamczyk
VP Business Development
Videa



Dot DiLorenzo
EVP, Director of Planning,
USIM



David Prager
VP Strategy and Business Development
Strata



Steve Walsh
EVP, Local Markets
comScore/Rentrak



Rob Weisbord
Chief Operating Officer
Sinclair Digital Group



Russell Zingale
President Eastern Division
USIM

Brett Adamczyk

VP Business Development, **Videa**

- Videa is dedicated to bringing premium video to programmatic buyers. We **focus on enabling local broadcasters to participate in programmatic marketplaces with the controls, sales models and stewardship that exist in traditional television sales.** We specialize in integrations with traditional television buying and trafficking systems, yield optimization and audience targeting.
- We are building a talented team of broadcast industry veterans, developers, product managers and data scientists to arm local broadcasters with the same big math capabilities as large advertisers and agencies.
- We understand that programmatic buying cannot grow without programmatic selling and we are laser focused on ensuring that our sell-side platform for linear TV is the best way for local broadcasters to monetize their inventory in an automated fashion.
- Brett was formerly with Berylson Capital Partners, Cerberus Capital Management, Rothschild.



Dot DiLorenzo

EVP, Director of Planning, USIM

- Successful people are often described as exceeding expectations and that is Dot DiLorenzo's trademark. As Executive Vice President, Director of Planning, Dot brings her inspirational energy, enthusiasm and extensive media experience to U.S. International Media.
- With experience at full-service agencies like O&M and JWT, media-management companies like Initiative and Carat, and with responsibilities for digital and traditional media under her belt, Dot is perfectly suited **to help the wide array of USIM's clients craft communication strategies that advance the "big idea" from inception through successful execution.**
- In addition to loving her job that's reunited her with former co-workers who are "best in class", Dot loves travelling to remote corners of the world to dive, learn a new language & sample unique culinary delights.
- Dot holds an Executive MBA from Pepperdine University.



David Prager

Vice President Strategy and Business Development, Strata

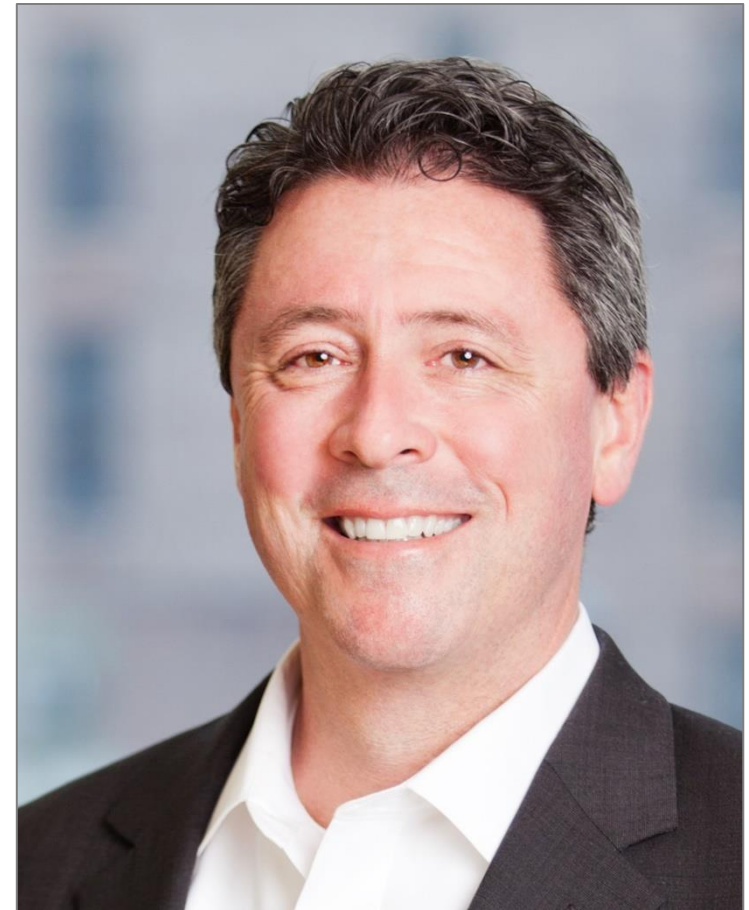
- Prager joined STRATA in 2009 and is currently **responsible for developing strategy for the organization and seeking out new business opportunities.**
- Prager is the former President of Click IT Solutions, a consultancy firm dedicated to helping organizations within the media industry maximize their use of technology. His client list included the Television Bureau of Advertising, for whom he architected and managed the development of the ePort project, the SNTA, for whom he helped TV Syndicators to implement Electronic Invoicing as well as Comcast Spotlight, for whom (among several projects) he helped create an Outsourced Print Center to support their invoicing needs.
- Before founding Click IT Solutions, Prager was Chief Information Officer for the Katz Media Group, the largest representation firm of radio and television stations in the US. Prior to that, he worked as a systems architect with Applied Information Systems (AIS), a software development company in Maryland.
- Prager also served as Director of Technology Innovation with the New York State Department of Social Services in Albany.



Steve Walsh

EVP, Local Markets, comScore

- Steve Walsh brings more than 20 years of proven strategic sales and sales management experience to his role as Executive Vice President of Local Markets for comScore.
- At comScore, Mr. Walsh leads a sales and account management team that has built a client roster serving over 630 client television stations and 150 local and regional agencies in over 175 markets since comScore Local launched in 2010. Today, Mr. Walsh and his team are **laser-focused on creating the new model for a dynamic, cross-platform local measurement currency based on massive scale and superior methodology**, to the benefit of the local broadcasters, agencies and marketers we all serve.
- Mr. Walsh holds a Bachelor of Science degree in Telecommunications Management from Syracuse University's S.I. Newhouse School of Public Communications and, in addition to being a member of the Television Bureau of Advertising (TvB), the Advertising Research Foundation (ARF) and the Advisory Board has been a featured guest lecturer at Syracuse University, New York University, the University of Florida and the University of Connecticut.
- He lives in Connecticut with his wife and children.



Rob Weisbord

Chief Operating Officer, Sinclair Digital Group

- Rob Weisbord was recently named Chief Operating Officer of Sinclair Digital Group a newly-created Digital Interactive Business Unit for Sinclair Broadcast Group.
- Mr. Weisbord is responsible for all web/mobile app/ social media creation, interaction of the unit with news and television station platforms, revenue generation, and exploring strategic partnerships and potential related acquisition.
- Mr. Weisbord joined Sinclair Broadcast Group in 1997 and has held various positions during his tenure. Most recently Mr. Weisbord held the position of Vice President of Digital Interactive Solutions.
- Sinclair Broadcast owns or operates 168 television stations in 77 US markets.



Russell Zingale

President Eastern Division, USIM

- Russell oversees 60+ staffers across all service divisions. His clients include CDC, Aruba Tourism, Century 21, O'Charley's Restaurants, People's United Bank, WellPet, K12, Delta Education, Institute of Culinary Education accounts among others on the east coast.
- Prior to working at USIM, Russell held the position of Managing Director at Media Storm. His role was dual, new business director as well as client service director on non-entertainment accounts.
- Russell is a **20+ year veteran in the media industry having spent the majority of his time developing strategy and running a planning group.** Prior to launching Carat Affiliates, Russell held management positions at Initiative Media where he worked on clients such as Applebee's, Goya, Enterprise Car Rental, AOL among a list of others.
- Prior to his 14 year tenure at Initiative, Russell held planning positions at Backer, Spievogel Bates and Wells, Rich Greene managing accounts such as Proctor & Gamble, US Navy, CPC, Avis Rent a Car and other.
- Russell is a St. John's graduate and lives with his wife and two children in Wilton, Connecticut.



Discussion Leader

Director, Programmatic TV Strategy, USIM

- Mitchell Oscar currently holds the position of Director, Programmatic TV Strategy, a newly created position at U.S. International Media, **focusing on the development and deployment of new video applications as they traverse programmatic TV, addressable TV, connected devices and streaming video.**
- His mission is to explore the potential value of these advanced television applications and technologies for the development (ideas and implications) and execution of advertising models and campaigns for USIM clients.



Mitch Oscar

Director of Programmatic TV Strategy, USIM
Executive Industry Advisor, BIA/Kelsey



“It will take longer than we thought to go programmatic.”

Aruba TV Campaign - USIM

The screenshot shows the Aruba website homepage. At the top left is the Aruba logo. A dark navigation bar contains links for ARUBA VACATIONS, WHERE TO STAY, THINGS TO DO, OUR ISLAND, TRAVEL TO ARUBA, BLOG, and FORUM. Below this is a search bar with a dropdown menu for 'options...' and two date pickers for 'Check-in/Arrival' and 'Check-out/Departure'. The main content area features a large blue sky background with white clouds. On the left, weather information is displayed: 'TEMP 84°F', 'LOCAL TIME 2:25 PM', and 'SUNSET TIME 6:46 PM'. A circular button on the right says 'YOUR VIRTUAL TOUR OF ARUBA'. The central headline reads 'ONE HAPPY ISLAND' in large white letters, with a red star below it. Below the headline is a paragraph: 'Our white-sand beaches, cooling trade winds and warm, friendly people are just a few reasons why so many people return to Aruba year after year. Choose a spotlight below to begin discovering everything that makes us One happy island.' At the bottom, there are four circular spotlights with different images: a person windsurfing, a beach with waves, a white bird colony, and a tree on a beach.

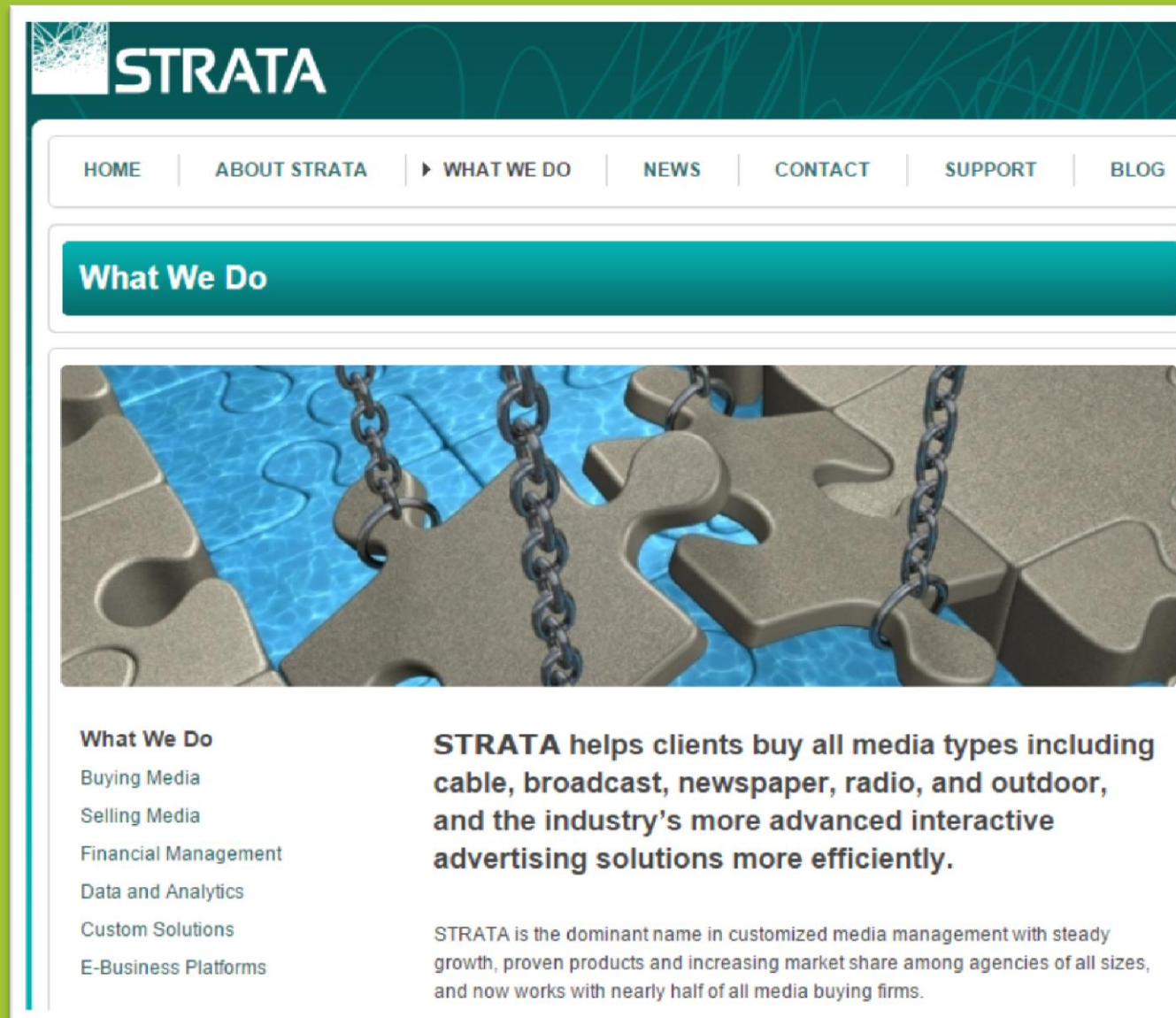
comScore

The screenshot shows the comScore website homepage. At the top left is the comScore logo. A dark navigation bar contains the following menu items: PRODUCTS, INDUSTRIES, INSIGHTS, PROGRAMMATIC, CROSS MEDIA, ACADEMY, ABOUT US, and CAREERS. Below the navigation bar is a dark grey section with the tagline "Precisely Everywhere™". The main content area is a large blue banner with the text "RENTRAK & COMSCORE ARE NOW ONE" in white, bold, uppercase letters. Below the banner is a dark grey footer section containing the comScore logo and tagline, an orange "LEARN MORE" button, and a set of navigation icons (a right-pointing chevron, five circles, and a vertical bar).

2016 Malibu and 2016 Silverado Chevrolet Campaigns



STRATA



The screenshot shows the STRATA website homepage. At the top left is the STRATA logo. A navigation menu includes links for HOME, ABOUT STRATA, WHAT WE DO (which is highlighted with a right-pointing arrow), NEWS, CONTACT, SUPPORT, and BLOG. Below the navigation is a teal banner with the text 'What We Do'. Underneath is a large image of interlocking puzzle pieces, some of which are suspended by metal chains. Below the image is a 'What We Do' section with a list of services: Buying Media, Selling Media, Financial Management, Data and Analytics, Custom Solutions, and E-Business Platforms. To the right of this list is a main text block that states: 'STRATA helps clients buy all media types including cable, broadcast, newspaper, radio, and outdoor, and the industry's more advanced interactive advertising solutions more efficiently.' Below this is a paragraph: 'STRATA is the dominant name in customized media management with steady growth, proven products and increasing market share among agencies of all sizes, and now works with nearly half of all media buying firms.'

Sinclair Digital – Part of Sinclair Broadcast Group

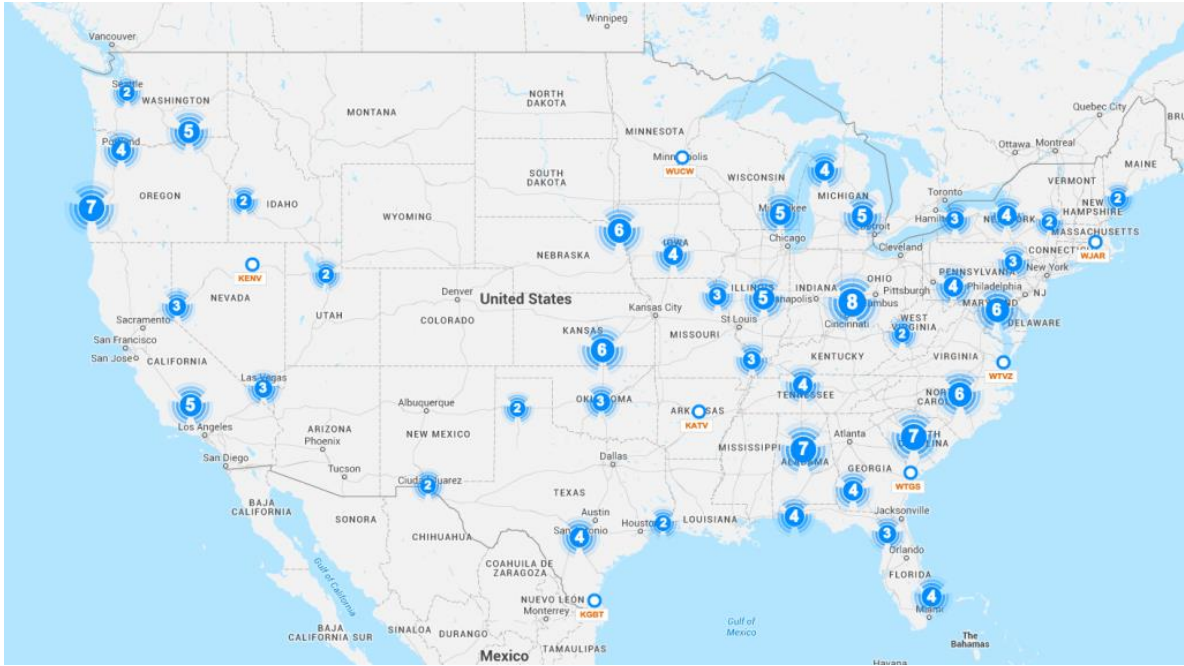
Sinclair owns and operates, programs or provides sales services to more television stations than anyone and has affiliations with all the major networks.



164
TELEVISION
STATIONS

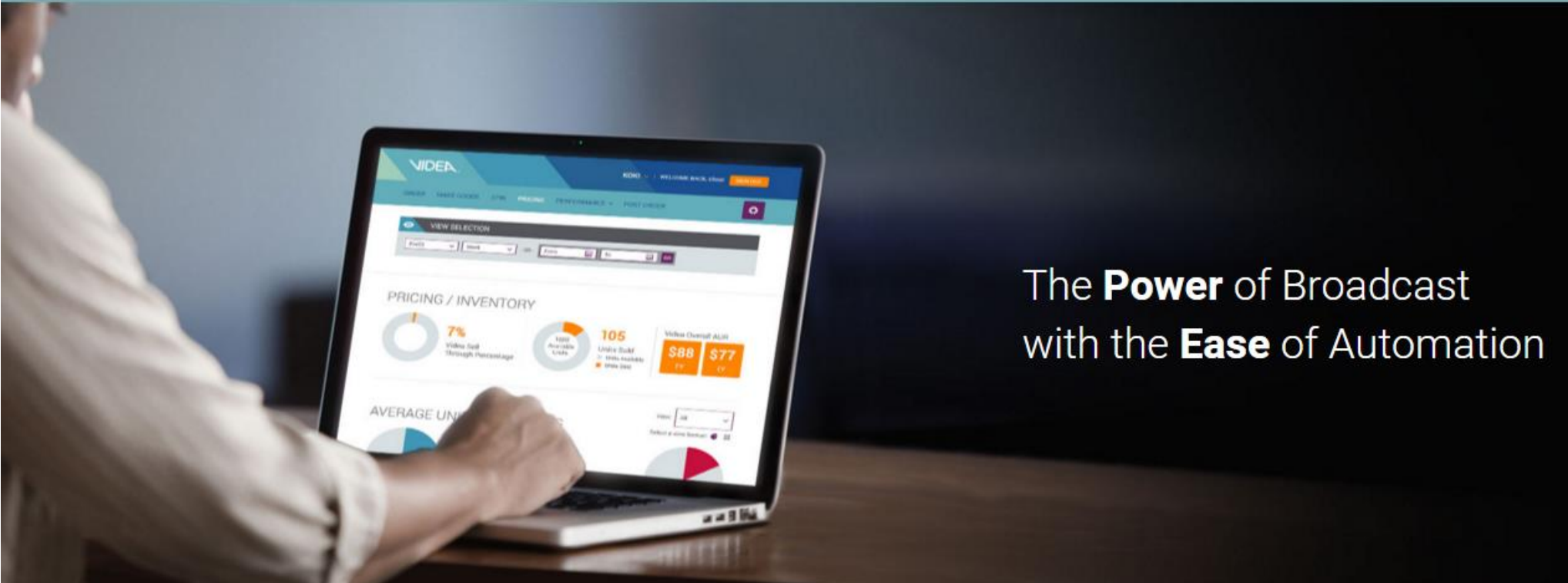
422
CHANNELS

79
US MARKETS

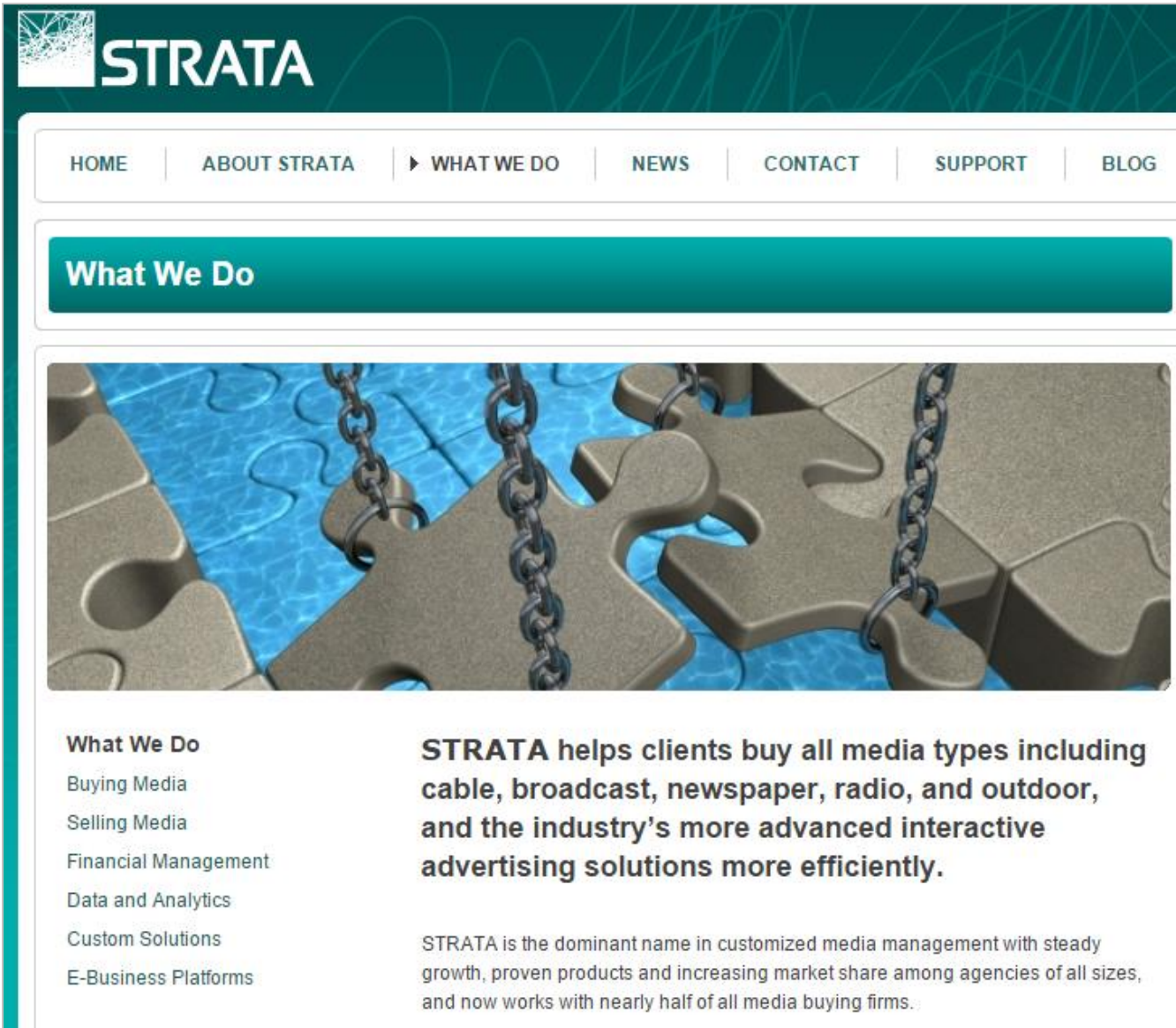


Videa

Owned by Cox Media Group, Videa is laser-focused on ensuring our sell-side platform for linear TV is the leading solution for local broadcasters to monetize their inventory in an automated fashion.



The **Power** of Broadcast
with the **Ease** of Automation




The screenshot shows the STRATA website interface. At the top left is the STRATA logo, which consists of a square icon with a network-like pattern followed by the word "STRATA" in a bold, white, sans-serif font. Below the logo is a horizontal navigation menu with the following items: HOME, ABOUT STRATA, WHAT WE DO (with a right-pointing triangle), NEWS, CONTACT, SUPPORT, and BLOG. Below the navigation menu is a teal-colored header for the "What We Do" section. Underneath this header is a large image of several interlocking puzzle pieces, some of which are suspended by metal chains. Below the image is a list of services on the left and a main text block on the right.

STRATA

HOME | ABOUT STRATA | ▶ WHAT WE DO | NEWS | CONTACT | SUPPORT | BLOG

What We Do

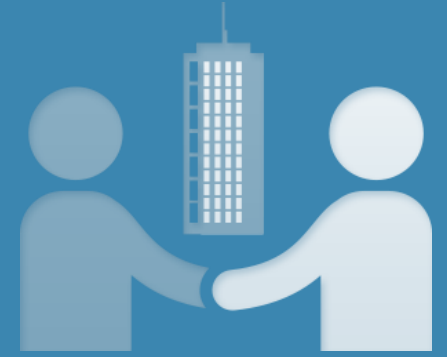


What We Do

- Buying Media
- Selling Media
- Financial Management
- Data and Analytics
- Custom Solutions
- E-Business Platforms

STRATA helps clients buy all media types including cable, broadcast, newspaper, radio, and outdoor, and the industry's more advanced interactive advertising solutions more efficiently.

STRATA is the dominant name in customized media management with steady growth, proven products and increasing market share among agencies of all sizes, and now works with nearly half of all media buying firms.



Expert Panel Question:

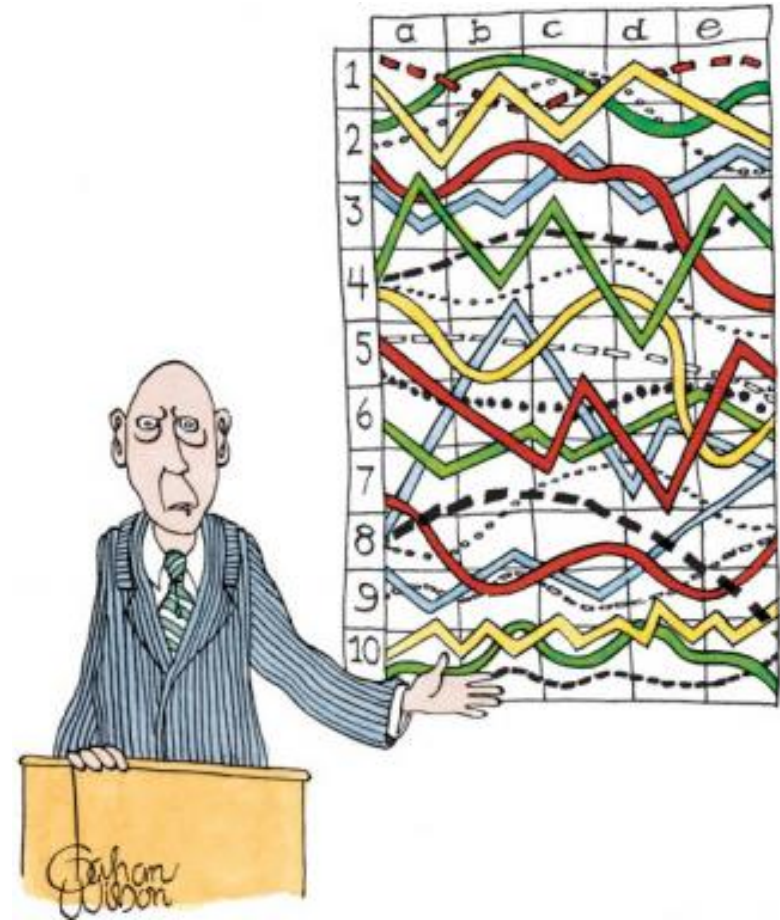
Is programmatic TV
complementary to the way in
which agencies transact today?



Expert Panel Question:

What is your opinion on
programmatic TV's acceptance
at advertising agencies?

Questions?



"I'll pause for a moment, so you can let this information sink in."

BIA/Kelsey's New Coverage Area: Programmatic TV Advertising

Analyst coverage initiated for fast growing new area of local advertising

- At BIA/Kelsey, **we've launched a coverage area service for local programmatic TV advertising.**
- With this service, we'll deliver meaningful, valuable analysis, data, forecasts and research. **Service subscribers will get access to proprietary reports, quarterly video briefings and live online meetings with the BIA/Kelsey analyst team.**
- Our goal is to thoroughly examine programmatic TV and addressable TV to help our clients develop a more confident affirmation of strategy and their particular roadmap. **Our clients will say, "Yes, we are ready to leverage this opportunity."**

Interested in Learning More?

Email us at sales@biakelsey.com and we'll share details.



Upcoming Report

Looking Ahead to Programmatic in Local TV in 2016

- **30-page report focuses on the area of programmatic advertising in local TV**, still a relatively new part of the programmatic marketplace.
- **Provides insightful answers to key questions from a panel of industry experts** representing agencies, station groups, data and platforms.
 1. How do you view programmatic TV in terms of compatibility with your existing traditional planning and buying endeavors?
 2. What are your key partnerships or initiatives in the programmatic TV realm?
 3. How do you view programmatic TV sales in terms of its compatibility to your existing traditional selling approach?
 4. How soon do you think programmatic TV buying will have an impact on local TV inventory purchasing?
 5. What is your opinion on programmatic TV's acceptance by advertising agencies?
 6. What are the opportunities you are seeing in the programmatic TV realm for data companies?

Available early March.

As a thank you to today's attendees, you can purchase our first report for a special price.

Join us at BIA/Kelsey BRANDS

BIA Kelsey

MARCH 22, 2016 | New York, NY

BRANDS

THE BRAND-TO-LOCAL

MARKETING SUMMIT



The first event to bring together all the key constituents of brand-to-local marketing — CMOs, agency execs, franchise marketers, media companies, and adtech and martech companies — for a **360-degree examination of the trends, technologies & alliances required for brand-to-local success.**

Welcoming Speakers From:



Special Session on Programmatic

PROGRAMMATIC + LOCAL TV = AUDIENCE TARGETING

Learn the top 5 things you need to know right now to drive targeting, efficiency and ROI.



Guiding **Media**. Inspiring **Innovation**. Leading **Local**.

Questions & Comments:

Rick Ducey

Managing Director

BIA/Kelsey

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rducey@biakelsey.com

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